Troubleshooting OBI Access

Created by Carmen Olsen

I want to change or create a report	I want to create/edit a dashboard	I want access to a certain folder, report or dashboard

SECURITY REQUIRED

• PeopleSoft User ID and Password • Access to PeopleSoft data • SEMA4 warehouse role (SEMA4 Only), Financials do not require separate role • Any warehouse role (see security form)	• PeopleSoft User ID and Password • Access to PeopleSoft data • SEMA4 warehouse role (SEMA4 Only), Financials do not require separate role • Agency-specific Dashboard Developer role (see security form)	• PeopleSoft User ID and Password • Access to PeopleSoft data • SEMA4 warehouse role (SEMA4 Only), Financials do not require separate role • An agency-specific web catalog role that gives you access to the folder, dashboard or report you require

Agency User

Column 1: I want to change or create a report

- Do you have A PS login? → No → Fill out security form
- Yes ↓
- Do you have access within PS to the data you need? → No → Fill out security form (for HCM you will need to request additional SEMA4 warehouse roles).
- Yes ↓
- Can you login to OBI? → No → Fill out security form, requesting **any** appropriate SWIFT warehouse (EPM) role
- Yes ↓
- Can you see the report you want to change? → No → Contact your agency administrator. There is a list available from the OBI Support dashboard within OBI
- Yes → If you need further support, contact the Help Desk.

Column 2: I want to create/edit a dashboard

- Do you have A PS login? → No → Fill out security form
- Yes ↓
- Do you have access within PS to the data you need? → No → Fill out security form (for HCM you will need to request additional SEMA4 warehouse roles).
- Yes ↓
- Can you login to OBI? → No → Fill out security form, requesting the **Dashboard Developer** SWIFT warehouse (EPM) role
- Yes ↓
- Can you see the dashboard you want to change? → No → Contact your agency administrator. There is a list available from the OBI Support dashboard within OBI
- Yes → If you need further support, contact the Help Desk.

Column 3: I want access to a certain folder, report or dashboard

- Do you have A PS login? → No → Fill out security form
- Yes ↓
- Do you have access within PS to the data you need? → No → Fill out security form (for HCM you will need to request additional SEMA4 warehouse roles).
- Yes ↓
- Can you login to OBI? → No → Fill out security form, requesting an **agency-specific** SWIFT warehouse (EPM) role
- Yes ↓
- Can you see the folder/report/dashboard? → No → Contact your agency administrator. There is a list available from the OBI Support dashboard within OBI
- Yes → If you need further support, contact the Help Desk.